

COVID-19

Recovery Signals Digest

A Roundup of
Travel Recovery Insights

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Introduction

The Recovery Signals Digest is a regular overview of travel recovery indicators compiled by Tourism Nova Scotia.

The report provides timely insights for Nova Scotia's tourism industry about factors that influence travel recovery including cases of COVID-19 in Canada and internationally, vaccinations, visitation and travel intentions.

If you have questions about the Recovery Signals Digest, please contact us at:
tourismresearch@novascotia.ca

Source Notes and Methodology

- **Google** is a US-based online search engine. Its *Destination Insights* ([Destination Insights with Google](#)) is a free public tool that uses Google search data for flights and accommodations as way of interpreting travel demand in particular destinations.
- **Statistics Canada** (www.statcan.gc.ca) is the national statistical office. Its international arrivals data is sourced from the Canada Border Services Agency and from land ports equipped with the automated Integrated Primary Inspection Line system. It's *Canadian Tourism Activity Tracker* combines data from multiple sources including counts of international travellers, commercial aircraft movements, hotel occupancy rates, restaurant sales and reservation bookings.
- **Destination Canada** (www.destinationcanada.com/) is a federal Crown corporation and Canada's national tourism marketing organization. Its *Travel Recovery Assessment* is based on analysis of research by Destination Canada and third-party sources. Its *Resident Sentiment* survey is a weekly online poll of 1,800 residents, with some questions alternating bi-weekly. The data is weighted to be reflective of the Canadian population.

Source Notes and Methodology

- The **Government of Canada's** COVID-19 data ([COVID-19 daily epidemiology update - Canada.ca](#)) is updated from sources including the Public Health Agency of Canada and provincial and territorial partners.
- **Destination Analysts** (www.destinationanalysts.com) is a San Francisco-based tourism market research firm. Its *American Travel Trends & Sentiment* report is based on an independent, weekly survey of 1,200 American travellers. The survey was launched in the wake of the COVID-19 pandemic and has been conducted every week since March 15, 2020.

Summary

- Google ranks **Halifax the 8th most popular destination** through the month of October 2021 in terms of online search interest about travel to Canadian cities. This is down from August-September when Halifax was ranked 6th; Ottawa and Quebec City have since pulled ahead of Halifax.
- According to Statistics Canada, trips to Canada by residents of other countries were **up 157% in August 2021** over July 2021, but were still down 87% compared with August of 2019.
- Statistics Canada's Tourism Activity Index shows that **combined tourism activity in Canada in August 2021 was 41% below the level of August 2019**. Nova Scotia's tourism activity was 48% below the level of August 2019 – the widest gap among all the provinces.
- The latest Destination Canada Travel Recovery Assessment says **all provinces and territories remained in the *Inter-provincial* phase** of recovery as of the end of October 2021, with residents in all parts of the country booking trips across provincial and territorial boundaries.

- Canada is geographically book-ended by higher levels of concern when it comes to domestic travel, according to Destination Canada's Resident Sentiment survey. People in British Columbia and Atlantic Canada are **far more worried about the safety of travel to other provinces, and about welcoming visitors to their communities from other provinces**, than are residents in the country's other regions, where sentiment on both questions is considerably more positive.
- The federal government reports that the **number of active COVID-19 cases in Canada is falling**, with fewer than 24,000 cases as of November 5, 2021. Nationally, the **rate of active cases on** November 5 stood at 62 cases per 100,000 people.
- Despite ongoing concerns around travel as the United States emerges from the Delta Variant phase of the pandemic, Destination Analysts reports signs of optimism about a 'return to normal,' including the fact that **three-quarters of US travellers are 'excited' about taking a leisure trip in the next 12 months.**

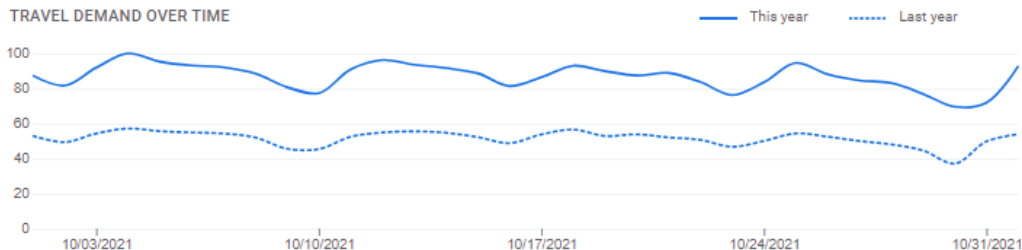
Google Destination Insights

As of November 1, 2021

Google Destination Insights: Online *Domestic* Travel Interest in Canada

- The graphs show Google searches by **Canadians** for flights and accommodations for **trips in Canada**. Demand is scored by search volume on an index of 0-100, with 100 being the highest indexed volume over the period measured.

30-day domestic travel demand Oct. 1 to Nov. 1, 2021



12-month domestic travel demand Nov. 1, 2020 to Nov. 1, 2021



Google Destination Insights: Online *International* Travel Interest in Canada

- The graphs show Google searches **worldwide** for flights and accommodation for **trips to Canada**. Demand is scored by search volume on an index of 0-100, with 100 being the highest indexed volume over the period measured.

3-month international demand, Oct. 1 to Nov. 1, 2021

TRAVEL DEMAND OVER TIME



12-month international demand, Nov 1, 2020 to Nov. 1, 2021

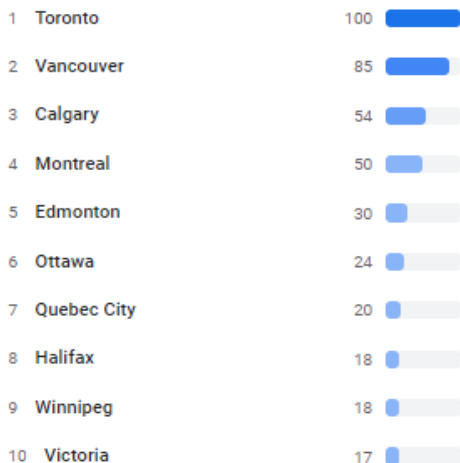
TRAVEL DEMAND OVER TIME



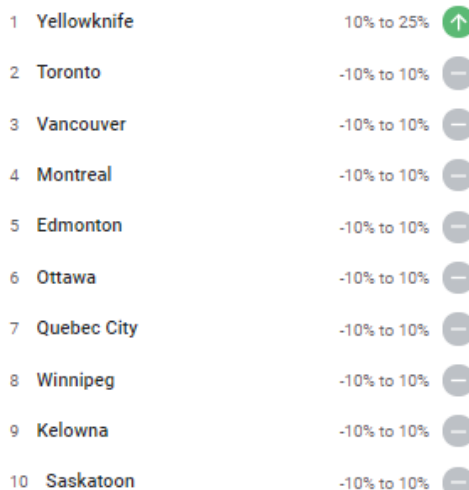
Google Destination Insights: 30-Day Domestic Demand by Destination City

- Cities are scored on an index of 0-100, based on domestic Google search demand by Canadians between **Oct. 1 to Nov. 1, 2021** for flights to and accommodations in Canadian cities. 100 is the highest indexed volume over the period.
- Growth is the % *change* in domestic Google travel search demand in the period **Oct. 1 to Nov. 1, 2021** compared to the previous 30-day period.

TOP DEMAND BY DESTINATION CITY



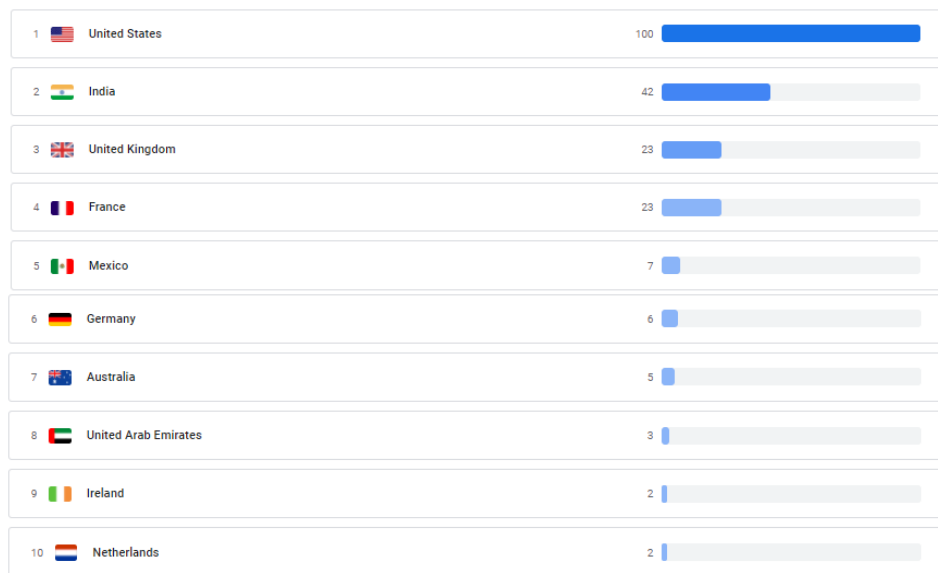
TOP GROWTH BY DESTINATION CITY



Google Destination Insights: 30-Day International Demand by Origin Country

- Top sources of worldwide search demand for international travel to Canada, **Oct. 1 to Nov. 1, 2021**. Countries are scored by search volume, on an index of 0-100, with 100 being the highest indexed volume over the period.

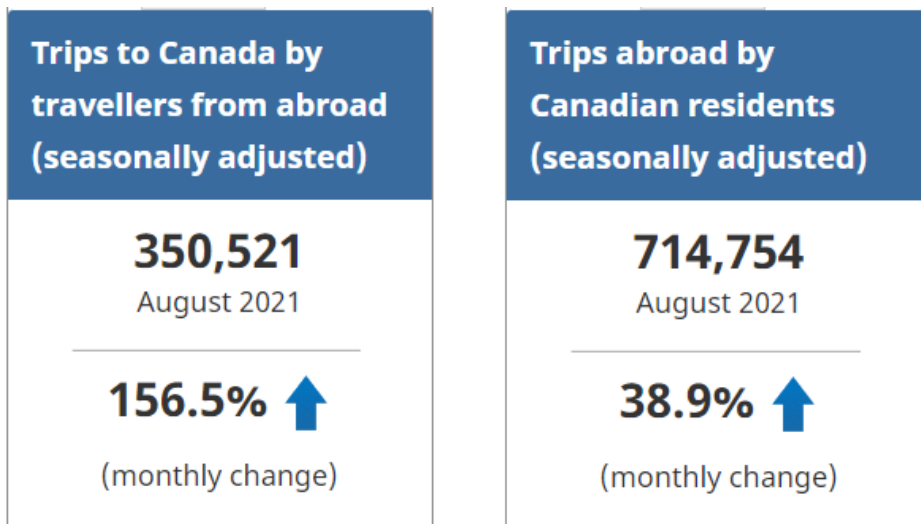
TOP DEMAND BY ORIGIN COUNTRY



Statistics Canada: Travel Between Canada and Other Countries – August 2021

Released October 22, 2021

Statistics Canada: Travel Between Canada and Other Countries



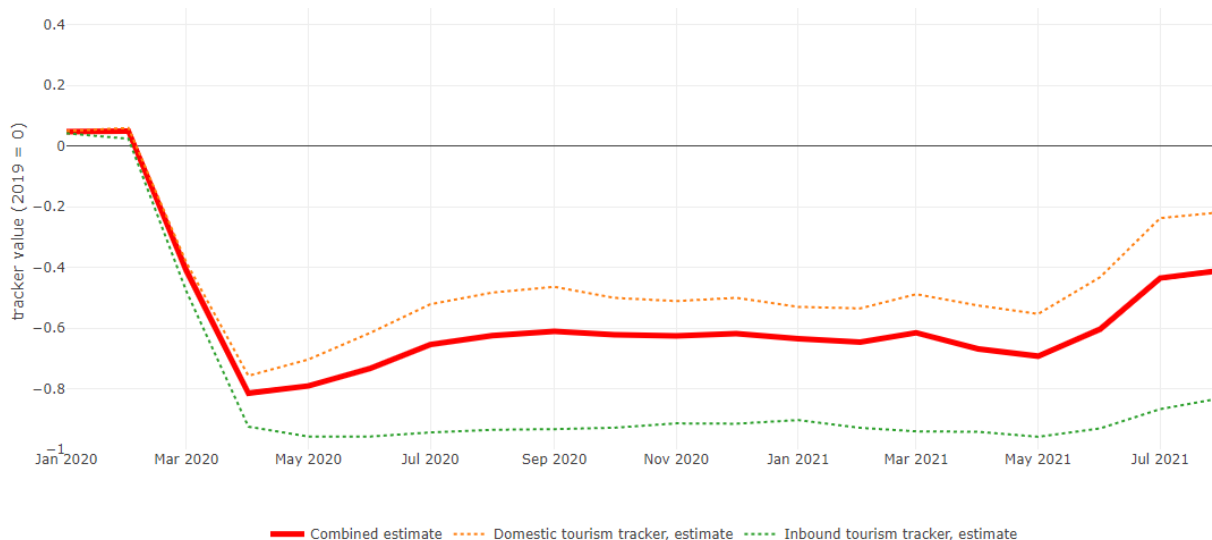
- Trips to Canada by travellers from other countries were **up 157%** in August over the previous month, and were up 381% from August 2020, but were down 87% from pre-pandemic levels in August 2019.
- Trips to other countries by Canadians were **up 23%** in August over the previous month, and were up 151% from August 2020, but were down 85% from pre-pandemic levels in August 2019.

Statistics Canada: Canadian Tourism Activity Index

Updated to August 2021

Statistics Canada: Tourism Activity Index – Canada

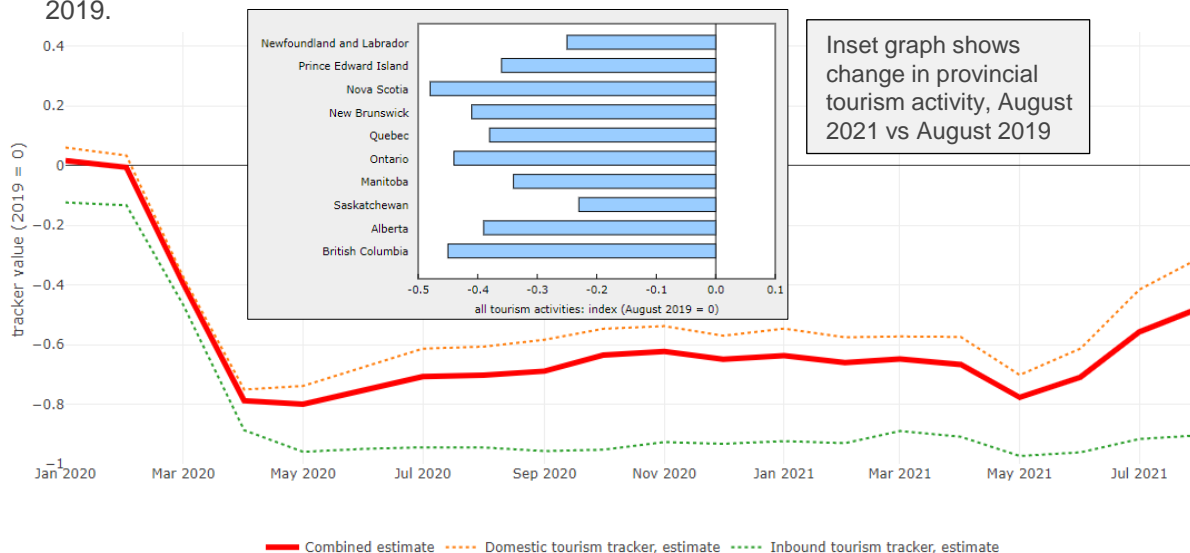
- The index shows the relative performance of aggregated tourism activity in Canada (ie. arrivals, departures, spending etc.) over time. The base period – with an index measure of '0' – is 2019.



- In **August 2021**, combined tourism activity in **Canada** was **41% below** the level in August 2019, which is a slight improvement from the index level in July 2021 (-44%).

Statistics Canada: Tourism Activity Index – Nova Scotia

- The index shows the relative performance of aggregated tourism activity in Nova Scotia (i.e. arrivals, departures, spending etc.) over time. The base period – with an index measure of '0' – is 2019.



- In **August 2021**, combined tourism activity in **Nova Scotia** was **48% below** the level in August 2019, an improvement from the index level in July 2021 (-56%). Nova Scotia's August decline is greater than the Canadian decline (41%) and is the largest decline among all provinces (see inset graph).

Destination Canada: Travel Recovery Assessment

Updated to October 26, 2021

Destination Canada Provincial Travel Recovery Assessment

Timeline of overall assessment for each province and territory:

	22-Jun	29-Jun	06-Jul	13-Jul	20-Jul	27-Jul	03-Aug	10-Aug	17-Aug	24-Aug	31-Aug	07-Sep	14-Sep	21-Sep	28-Sep	05-Oct	12-Oct	19-Oct	26-Oct
British Columbia	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Alberta	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Saskatchewan	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Manitoba	II	II	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Ontario	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Quebec	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
New Brunswick	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nova Scotia	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Prince Edward Island	III	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Newfoundland & Labrador	III	III	III	III	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Yukon	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Northwest Territories	III	III	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV
Nunavut	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV	IV

Legend:

- Indicates a forward phase progression
- Indicates a backward phase regression

I	II	III	IV	V	VI
COVID-19 Response	Hyper Local	Intra-prov	Inter-prov	Tentative Int'l	Regularized Int'l

Definitions:

I COVID-19 Response	II Hyper Local	III Intra-prov	IV Inter-prov	V Tentative Int'l	VI Regularized Int'l
Movement is restricted and travel is either not possible, desirable or encouraged.	Movement within local areas is possible but trips are not being booked within their province or territory.	Residents are booking trips within their province or territory.	Residents are booking trips within the country, across provincial or territorial boundaries.	Some international travel, such as family related or urgent business. Some leisure travel from less risk averse travellers.	Some business travel is re-introduced and leisure travel is closer to pre-COVID-19 levels.

According to Destination Canada's travel sentiment data, as of **October 26**:

- All provinces and territories remain in the **Inter-provincial (IV)** phase of recovery.
- There has been no change to the assessment since August 10.

Destination Canada: Resident Sentiment Survey

Updated data to week of October 25, 2021

Destination Canada Resident Sentiment – Safety of Travel

- 'I feel safe to travel to...'

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Communities near me	84	86	76	86	78	89	93	85
Communities in my province	74	83	71	81	80	85	83	86
Other provinces in Canada	49	69	62	60	60	43	42	45
The United States	22	44	32	32	36	16	16	16
Other countries	22	36	28	30	30	14	14	15
SAMPLE SIZE	202	200	200	606	404	200	127	72

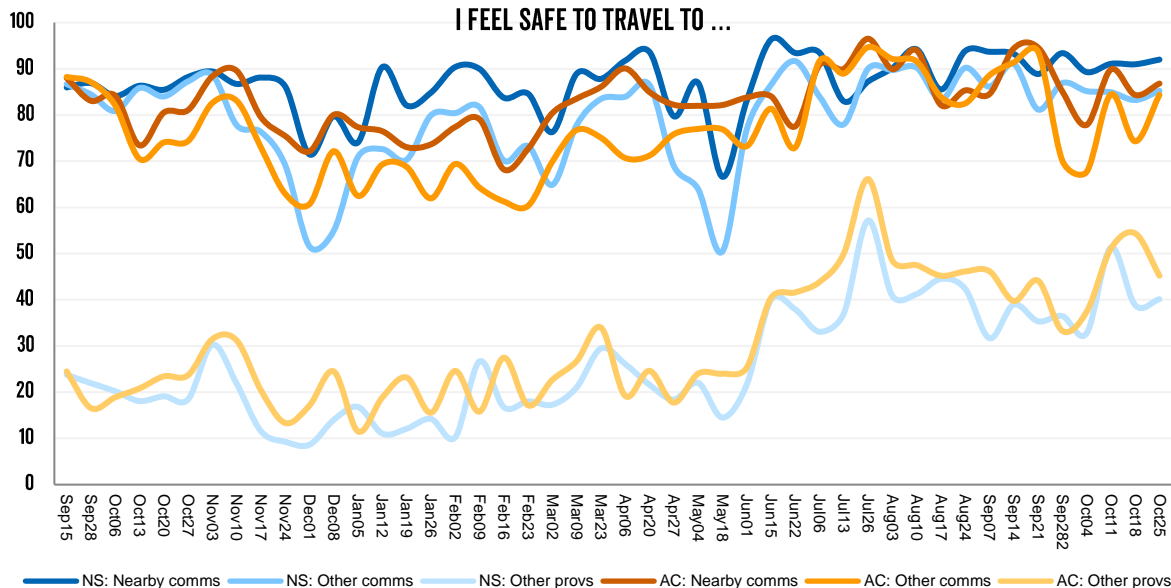
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of October 25, 2021.

Destination Canada Resident Sentiment – Safety of Travel

- A majority of Canadians report feeling safe travelling *to nearby communities* and *elsewhere in their own provinces*. Meanwhile, only a minority feel safe travelling *internationally*.
- With respect to travelling to *other provinces*, there are two distinct groups of regions: fewer than half of residents in Atlantic Canada and British Columbia would feel safe travelling to other provinces. Meanwhile, about 60-70% of residents in the remaining regions would feel safe.
- Atlantic Canadians' feelings of safety travelling *within their provinces* are the highest in the country, while their comfort level with *international travel* is the lowest in the country.

Destination Canada Resident Sentiment – Safety of Travel, NS vs Rest of Atlantic

ATLANTIC CANADIANS (EXCLUDING NS) VS NOVA SCOTIANS



- For both Nova Scotians and Atlantic Canadians, the gap in safety sentiment between travel within one's home province and travel to other provinces has been narrowing since early summer.

Destination Canada Resident Sentiment – Welcoming Visitors

- ‘I would welcome visitors travelling to my community from ...’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Other communities near me	72	80	73	78	77	82	84	84
Other parts of my province	57	73	70	76	82	75	76	76
Other parts of Canada	44	68	59	65	70	50	51	49
The United States	23	37	35	33	43	24	24	24
Other countries	26	32	30	29	38	20	20	20
SAMPLE SIZE	206	203	200	606	413	200	123	75

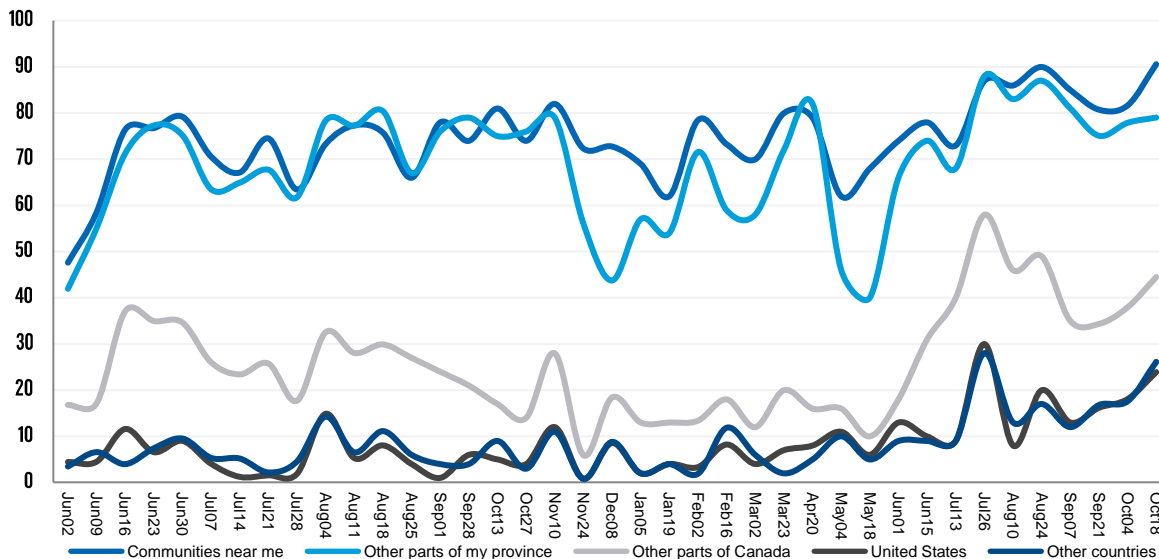
- % Somewhat / Strongly Agree.
- Note: red/green text indicates a significant difference between regions.
- Results from week of October 19, 2021.

Destination Canada Resident Sentiment – Welcoming Visitors

- Canadians remain generally negative about welcoming *international* visitors, with Atlantic Canadians among the most negative in this regard.
- About two-thirds of Canadians from most regions are willing to welcome visitors from *other parts of the country*, with Atlantic Canadians and British Columbia residents the least positive.
- A majority of Canadians in all regions are willing to welcome visitors from *within their own province*.

Destination Canada Resident Sentiment – Welcoming Visitors, Among Nova Scotians

NOVA SCOTIANS: I WOULD WELCOME VISITORS TRAVELLING TO MY COMMUNITY FROM ...



- A large majority of Nova Scotians would welcome visitors from *within their province*, while few would welcome *international* visitors. Positive sentiment in welcoming visitors from *other parts of Canada*, which dipped in late summer, has not yet returned to its July highs.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- ‘How would you feel if you saw an advertisement today promoting your community to each of the following regions as a place for visitors to come when it is safe?’

	REGION OF RESIDENCE						ATLANTIC CANADA	
	BC	AB	SK / MB	ON	QC	ATL	Rural	Urban
Other communities near me	+40	+42	+33	+39	+41	+49	+61	+41
Other parts of my province	+33	+42	+26	+35	+42	+42	+52	+35
Other parts of Canada	+8	+34	+11	+18	+32	+2	+11	-3
The United States	-31	-3	-21	-18	-1	-42	-40	-43
Other countries	-32	-10	-29	-19	-5	-40	-42	-38
SAMPLE SIZE	208	206	204	611	420	200	116	84

- Net level of happiness is the total of Very happy/Happy, less the total of Very unhappy/Unhappy.
- Note: **Green** text indicates a net positive response, **red** text a net negative response, **black** text a neutral response.
- Results from week of October 25, 2021.

Destination Canada Resident Sentiment – Promoting Home Community to Visitors

- Canadians in all regions are positive about their communities being promoted as places to visit to people from *nearby communities* and *other parts of their own province*. Atlantic Canadians are the most positive in this regard.
- There is increasing variability among regions when it comes to having their communities advertised to visitors from *other parts of the country*: residents of British Columbia and Atlantic Canada are neutral, Saskatchewan / Manitoba and Ontario residents are slightly positive, while residents of Quebec and Alberta are quite positive about the idea.
- Canadians in all regions remain neutral-to-negative about their communities being promoted as travel destinations to *international* visitors, with residents of Alberta and Quebec being mainly neutral about the prospect of such advertising.

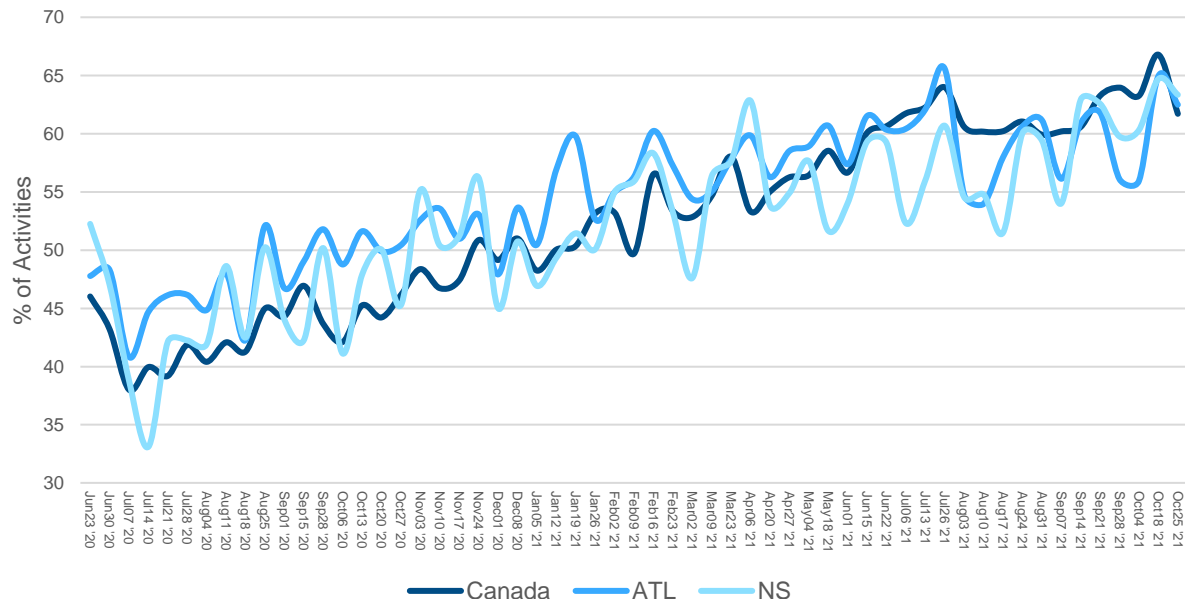
Destination Canada – Comfort With Activities, Most/Least Comfortable

- ‘Once governments lift the protective measures put in place to fight COVID-19, which of the following would you be comfortable doing ...’

Activity	Canada	Atlantic Canada	Nova Scotia
Activities most comfortable with:			
Allowing in-home renovations	81	85	92
Shopping at the mall	80	78	81
Going back to your workplace/office	77	93	87
Dining in restaurants	76	79	80
Activities least comfortable with:			
Going to bars, lounges, night clubs, pubs	47	43	38
Large gatherings such as sporting events, concerts, or festivals	46	46	50
Flying on an airplane	44	46	51
Travelling to the United States	41	30	35
SAMPLE SIZE			
	1812	200	99

- % Comfortable with each activity, among applicable.
- Results from week of October 25, 2021.

Destination Canada – Comfort With Activities (% Overall)



- Graph shows the overall % of activities respondents would be comfortable participating in, based on the activities applicable to each respondent.

Destination Canada – Comfort With Activities

- The overall percentage of activities that Canadians are comfortable with has been gradually increasing over the course of 2021.
- Among those activities Canadians are least comfortable with, a large minority – at least four in 10 – now express comfort with *going to bars and pubs, attending large public gatherings, and flying on an airplane*. The least popular activity among Canadians is *travelling to the United States*, with a low of 41% saying they are comfortable doing this.
- Atlantic Canadians do not share other Canadians' increasing willingness to *travel to the United States*.

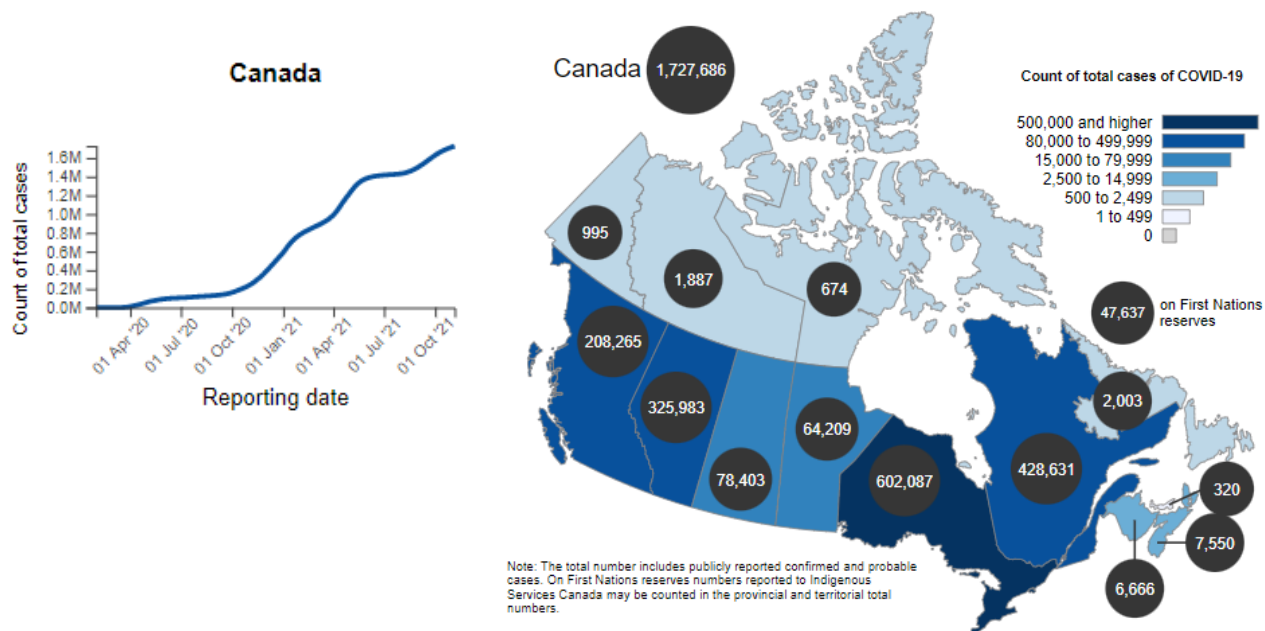
Government of Canada COVID-19 Status

As of November 5, 2021

Government of Canada – COVID-19

Count of *Total* Cases

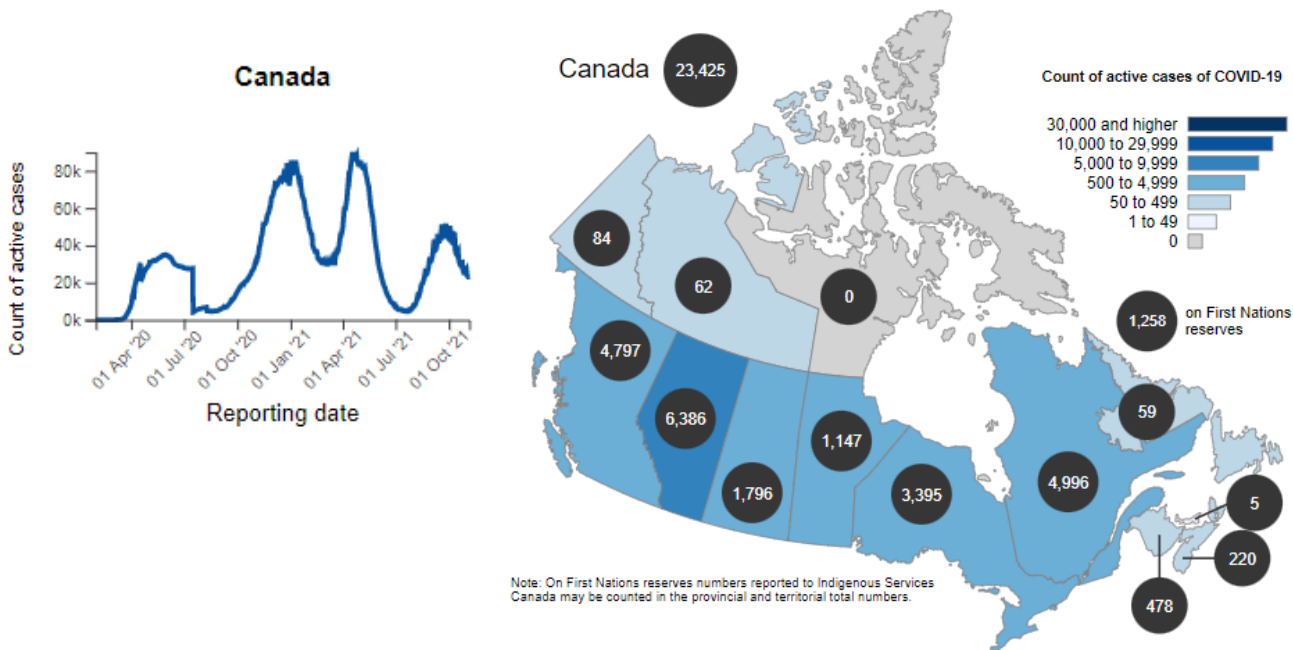
- The count of total cases of COVID-19 in **Canada** was **1,727,686** as of November 5, 2021.



Government of Canada – COVID-19

Count of *Active* Cases

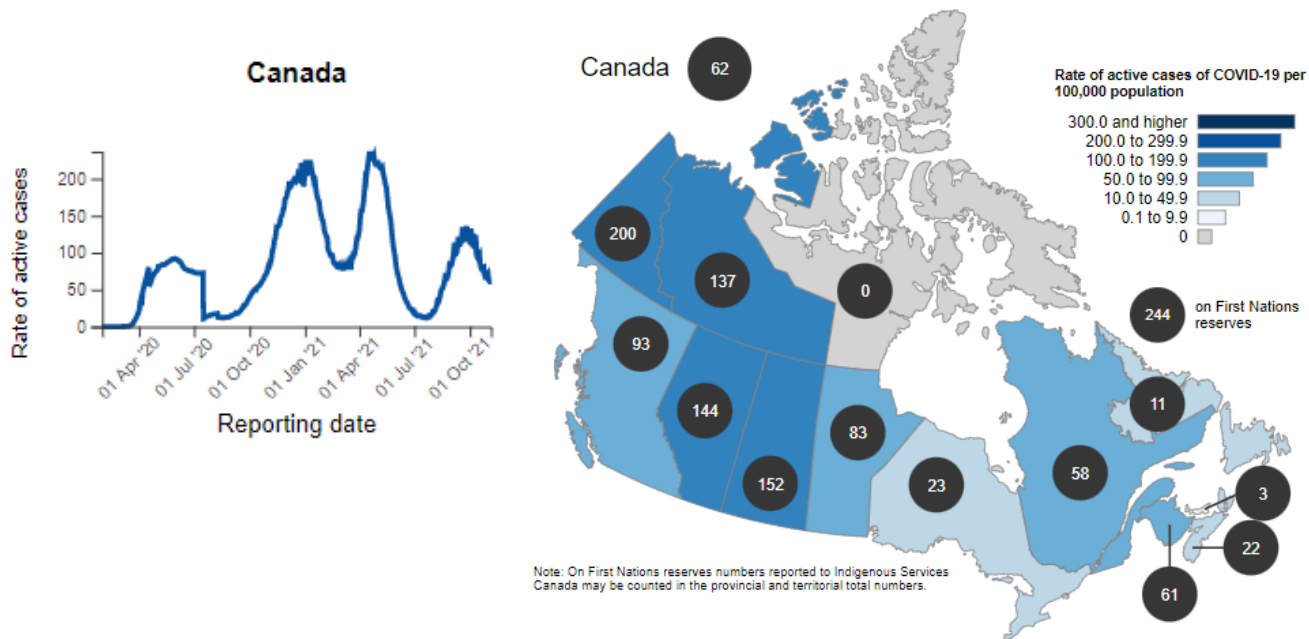
- The count of active cases of COVID-19 in **Canada** was **23,425** as of November 5, 2021.



Government of Canada – COVID-19

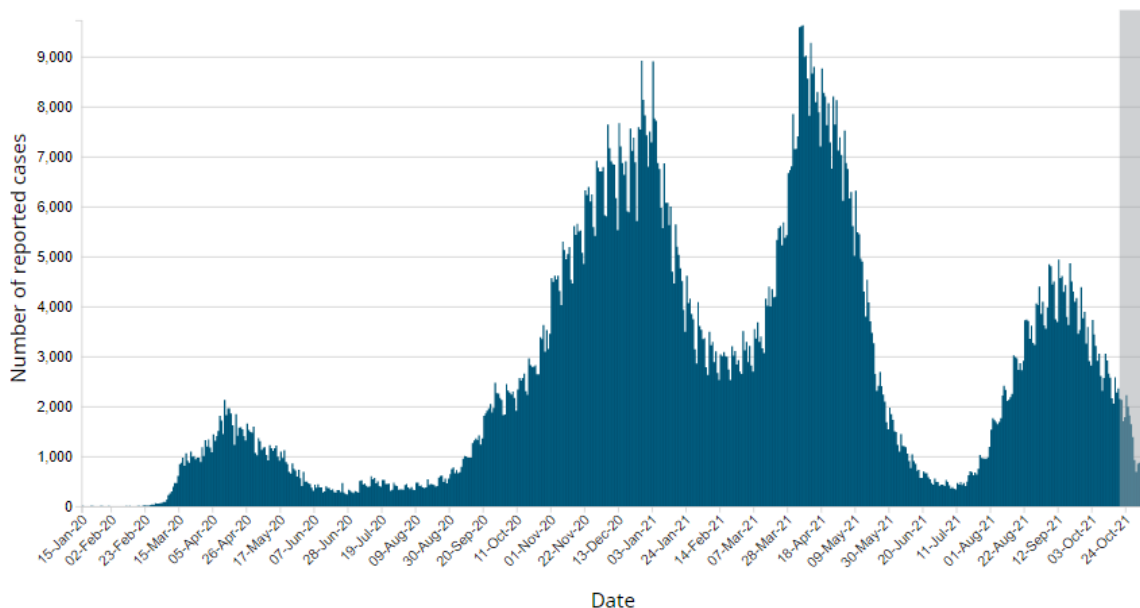
Rate of Active Cases

- The rate of active cases of COVID-19 in **Canada** was **62 per 100,000 population** as of November 5, 2021.



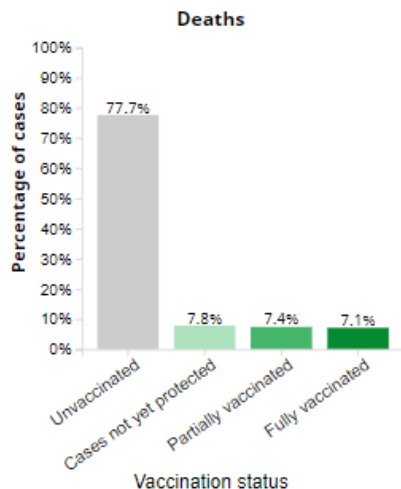
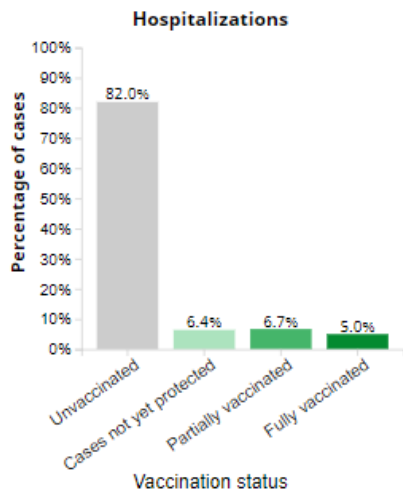
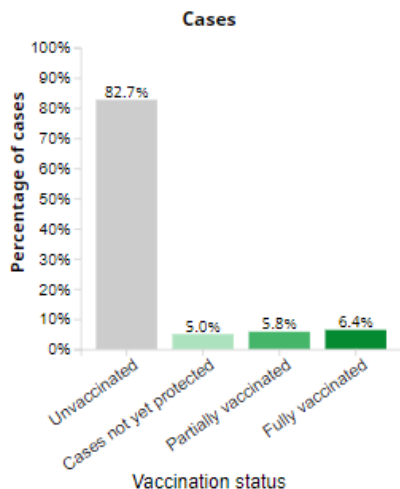
Government of Canada – COVID-19 Cases by *Date* (Epidemic Curve)

- Total COVID-19 cases in Canada (n=1,718,937) by date of illness onset, as of November 5, 2021.



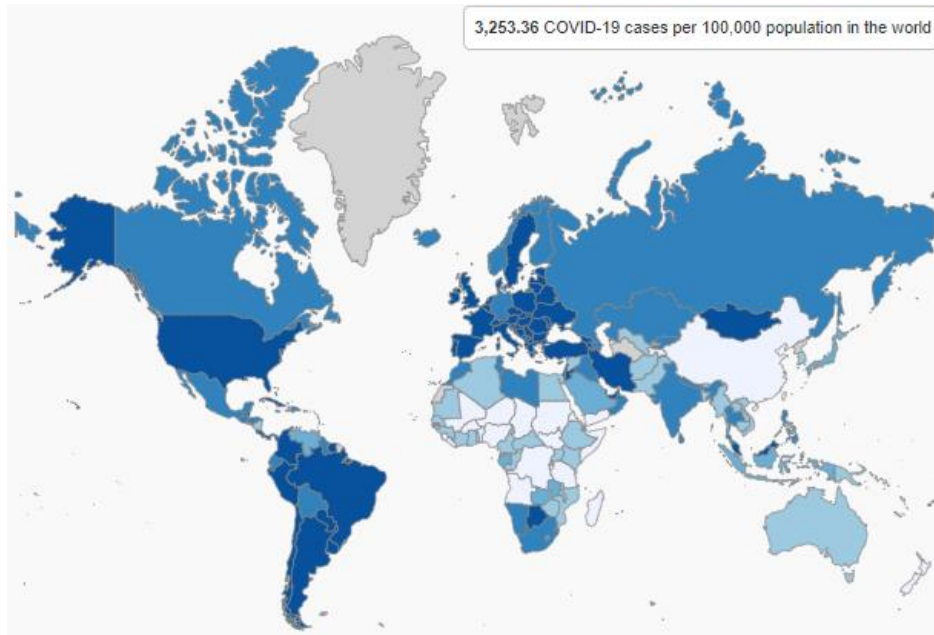
Government of Canada – COVID-19 Cases by *Vaccination Status*

- Total COVID-19 cases in Canada by vaccination status, as of October 16, 2021.

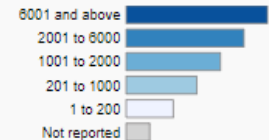


Government of Canada – COVID-19

World Cases Per 100,000 People

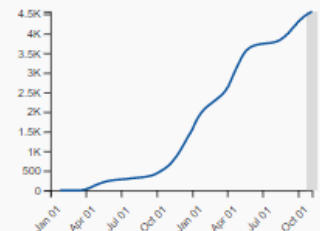


Number of cases per 100,000 population of COVID-19



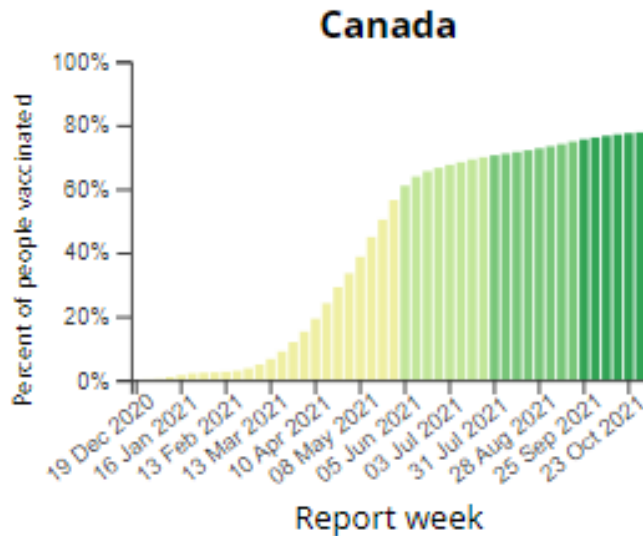
Canada

4,563.56 COVID-19 cases per 100,000 population as of November 6th, 2021.



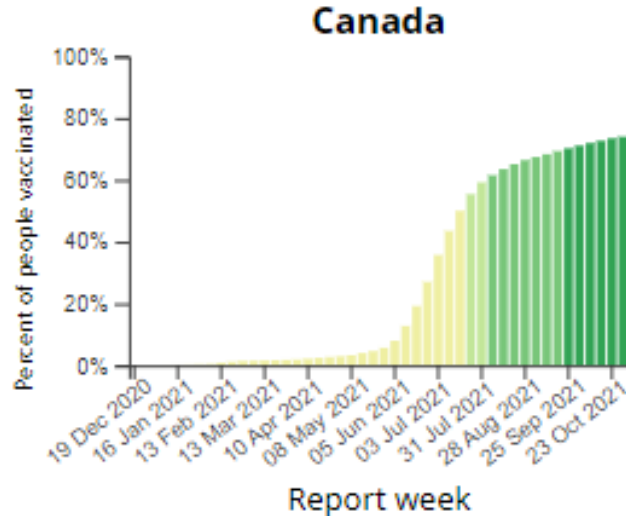
Government of Canada – Percentage With At Least 1 Vaccine Dose

- The cumulative percent of the population who have received **at least one dose** of a COVID-19 vaccine in Canada was **77.68%** as of October 30, 2021.



Government of Canada – Percentage Fully Vaccinated

- The cumulative percent of the population **fully vaccinated** with a COVID-19 vaccine in Canada was **73.96%** as of October 30, 2021.



Nova Scotia COVID-19 Cases

- The Province of Nova Scotia provides daily updates of new cases of COVID-19, total active cases of COVID-19, and cumulative cases of COVID-19, as well as doses of COVID-19 administered within the province.
- See the Province of Nova Scotia's COVID-19 data dash board at:
<https://novascotia.ca/coronavirus/data/#dashboard>

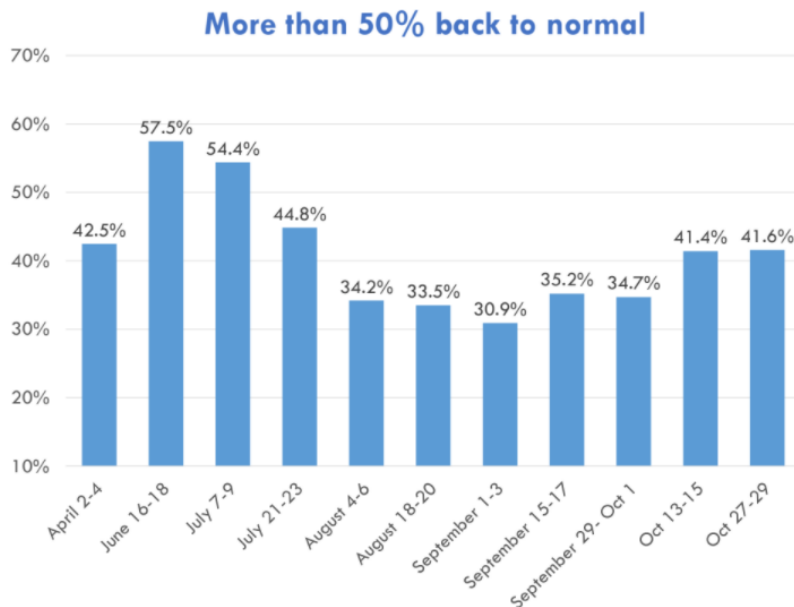
Destination Analysts American Travel Sentiment Tracker

Updated to November 2, 2021

Destination Analysts: Upturn in Traveller Sentiment that US is Getting Back to Normal

Question: Overall, how close to “normal” is the U.S. in terms of resuming leisure activities (dining out, travel, etc.)?

(Base: Wave 70 data. All respondents, 1,208 completed surveys. Data collected July 21-23, 2021)

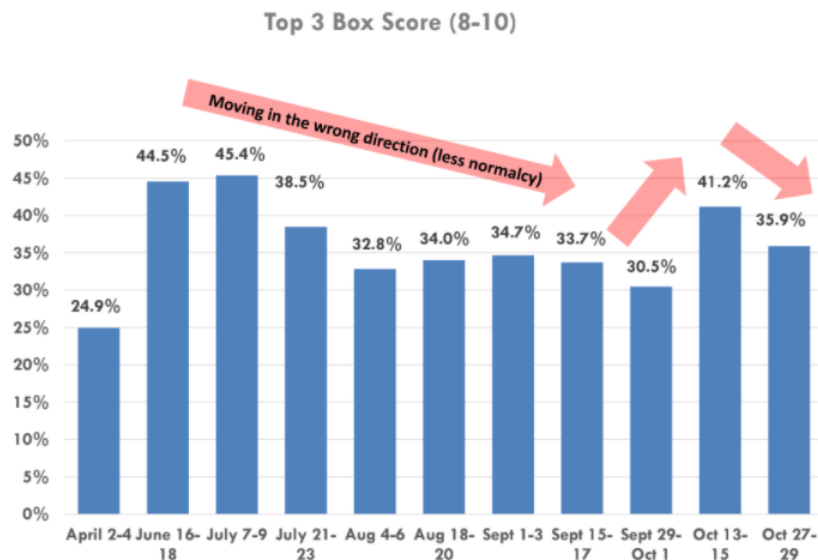


- The number of US travellers who say their country is **more than 50% back to ‘normal’** – in terms of resuming travel and leisure activities – declined through the summer as a result of the COVID-19 Delta variant outbreak. However, ‘back to normal’ sentiment is now rising again.

Destination Analysts: 36% of US Travellers Say They Can Now Travel 'As They Like'

Question: Now let's talk about how close (or far from) your life is to normal (i.e., being totally unaffected by the COVID-19 situation). For each, tell us about your life using the scale where 1 equals "Still very far from normal" and 10 equals "Already completely normal."

(Base: Wave 76 data. All respondents, 1,208 completed surveys. Data collected October 13-15, 2021)

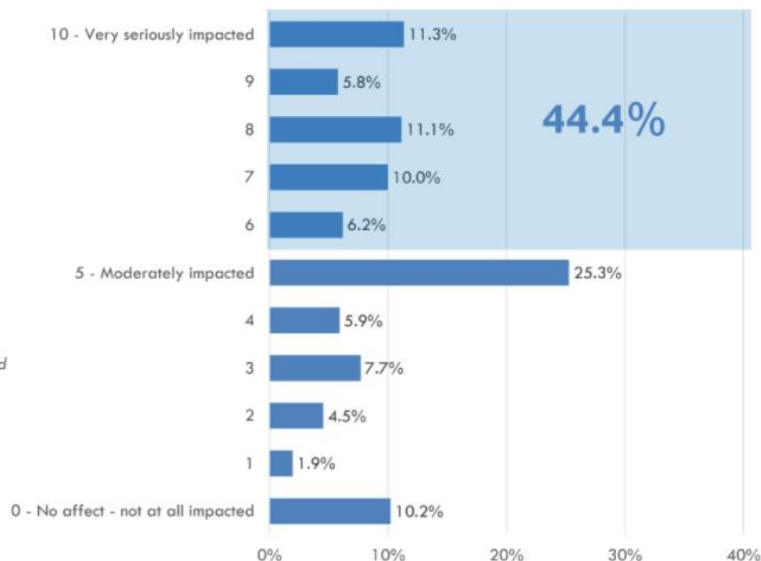


- When asked, **'Do you have the ability to travel as you like'**, 36% of US travellers gave high positive responses in terms of the ability to travel normally again after the COVID-19 pandemic.

Destination Analysts: Pandemic Still Impacting US Traveller Experiences

Question: How much is the COVID-19 issue impacting your ability to have meaningful travel experiences? (Select one)

(Base: Wave 77 data. All respondents, 1,202 completed surveys. Data collected October 27-29, 2021)



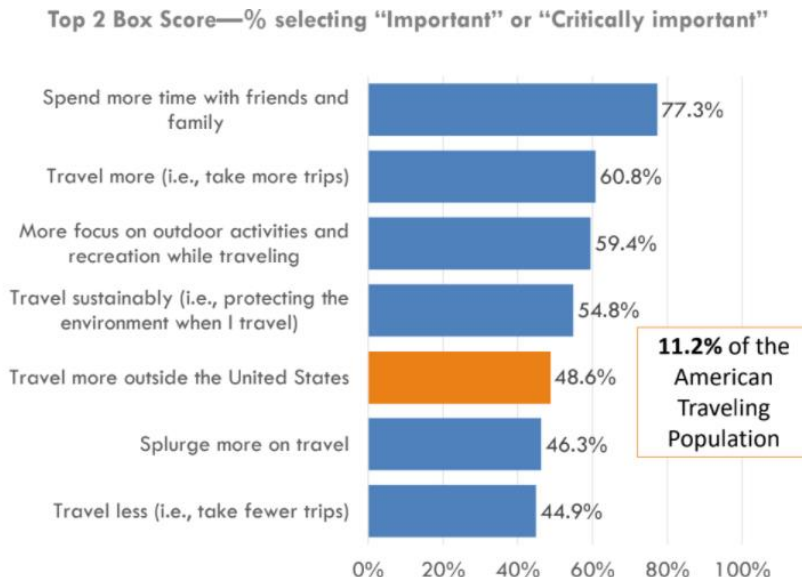
- A large minority of US travellers – more than four in 10 – believe COVID-19 continues to seriously impact their ability to have meaningful travel experiences, while another one-quarter say it continues to ‘moderately’ affect travel.

Destination Analysts: American Travellers Ready to Take More Trips After Pandemic

Question: Think about how you intend to change the way you travel as we move out of the pandemic.

How important is changing each of the following to you?

(Base: Wave 77 data. All respondents, 1,202 completed surveys. Data collected October 27-29, 2021)

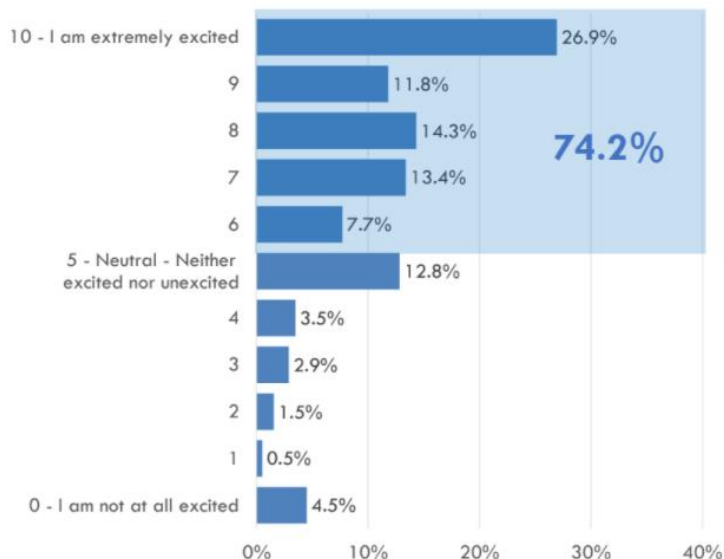


- More than half of US travellers consider it important to travel more, have more outdoor travel experiences and travel sustainably once the pandemic recedes. Almost one-half consider it important to travel more outside the United States.

Destination Analysts: Americans Excited About Leisure Travel in Next 12 Months

Question: Which best describes how excited you are about LEISURE TRAVEL in the **NEXT TWELVE (12) MONTHS?** (Please answer using the 11-point scale below)

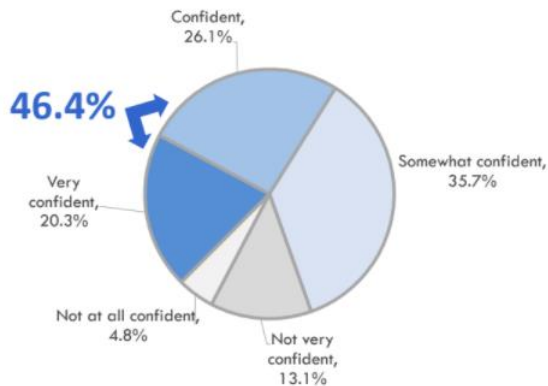
(Base: Wave 77 data. All respondents, 1,202 completed surveys. Data collected October 27-29, 2021)



- Three-quarters of US travellers say they're excited – including 27% who say they're 'extremely excited' – about leisure travel in the next 12 months.

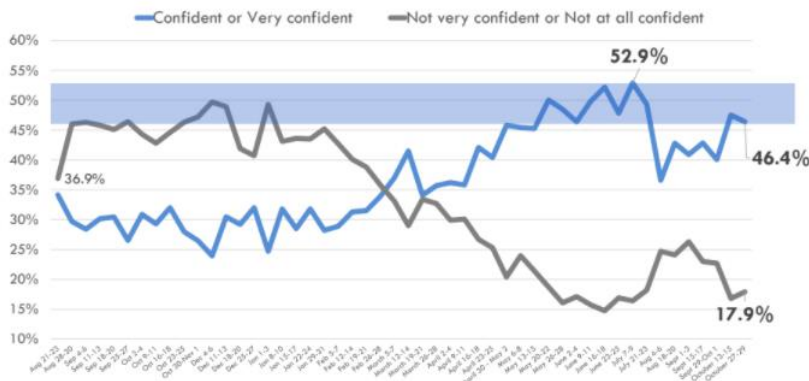
Destination Analysts: Safety Concerns Remain High Among US Travellers

Question: How confident are you that you can travel safely in the current environment?



(Base: Wave 24-34 and 39-77 data. All respondents, 1,200+ completed surveys each wave.)

Historical data

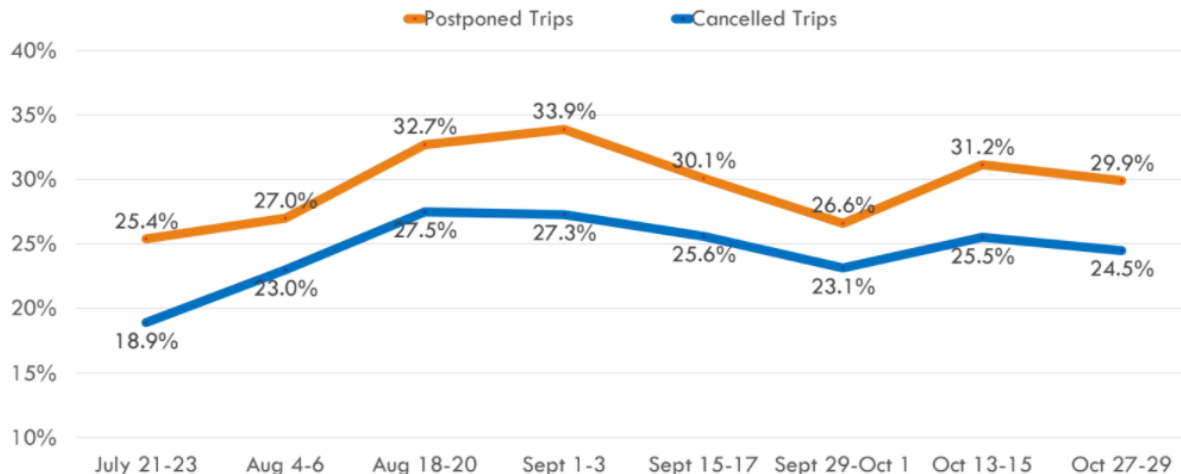


- Fewer than one-half of US travellers say they're confident that they can now travel safely – but that number has been generally rising since mid-summer.

Destination Analysts: Some US Travellers Still Putting Off Travel Due to Delta Variant

Question: Have you postponed any upcoming trips specifically due to the Delta variant?

Question: Have you cancelled any upcoming trips specifically due to the Delta variant?



- A significant minority of US travellers – between 25% to 30% – have postponed or cancelled upcoming trips as a result of the COVID-19 Delta variant.

